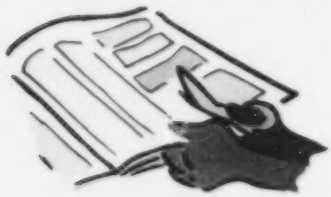
TAMS
Travel Activities & Motivation Survey

INFLUENCED BY ADS?

A PROFILE OF THOSE WHO USE ADVERTISEMENTS TO PLAN THEIR TRIPS



Ontario

Ministry of Tourism and Recreation

104-00690/

INTRODUCTION

During the fall of 1999 and the winter of 2000, the Ministry of Tourism and Recreation in partnership with tourism organizations across Canada conducted two household surveys to determine the travel behaviour and characteristics of Canadian and US residents (Travel Activities and Motivation Survey - TAMS). The Canadian survey consisted of 18,385 and the US of 28,397 telephone interviews.

People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mail back questionnaire. Overall, 40,271 qualified for the mail back questionnaire. Of these, 11,892 (29.4%) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0%) of the U.S. respondents returned the questionnaire.

This report presents a profile of those who indicated in the mail back survey that when they plan a getaway or a longer vacation trip they use TV advertisements, newspaper or magazine advertisements or travel information received by mail as sources of information.

The total number of respondents in the sample who said that they used TV advertisements, newspaper or magazine advertisements or travel information received by mail as sources of information when planning their getaway or longer vacation trips is as follows:

Canadian Survey:	1,833
US Survey:	2,593

EXECUTIVE SUMMARY

- A total of 6.2 million Canadians and 61.6 million Americans aged 18 years and over who had taken a trip of one or more nights over a two-year period indicated that they used advertisements as an information source to plan their getaways or longer holidays. This accounts for 34.7% of all Canadians and 40.3% of all Americans aged 18 years and over who had taken a trip of one or more nights over a two-year period.

- Canadian travellers who had used advertisements as information sources to plan their trips have the same incidence of travel, for any purpose, to Canada, but a much higher incidence of travel to the US or to overseas countries, while American travellers who had used advertisements as information sources to plan their trips have a higher incidence of travel than other travellers, for any purpose, to any destination, especially to Canada, Mexico/Caribbean and to overseas countries.

- Canadian travellers who consult advertisements do not represent the majority of the Canadian overnight leisure visitors to any destination except in New Brunswick and Hawaii. On the other hand, American travellers who consult advertisements do represent the majority of US overnight leisure visitors to most destinations Americans visit, especially in Atlantic Canada, Saskatchewan and Yukon.

- Advertisements in newspapers and magazines are by far the most consulted sources of information by the American and Canadian travellers who are influenced by ads, followed by visits to travel and trade shows. On the other hand, advertising pamphlets received by mail or TV ads are not very significant sources of information for them.

- The advice of friends and relatives and past experience with the destination are the top two sources of information for American and Canadian travellers who are influenced by ads, while advertisements in newspapers are at the same level of significance as travel agents and articles (as opposed to ads) in newspapers or magazines for Canadian travellers influenced by ads and a bit lower than travel agents, the Internet or articles in newspapers and magazines for their American counterparts.

- Compared to longer holidays, getaways trips are driven by "spare-of-the-moment" decisions based on the attractiveness of package deals depicted in newspapers or magazines.

- Do people who use ads as a source of travel information get influenced by them and as such travel more than the others, or do they have a higher tendency to travel and it is because of this that they consult more information sources? Although the data captured by TAMS do not provide a definitive answer to this question, the information presented in this report suggests that a higher tendency to travel may be causing travellers to resort to ads rather than the other way around and that although advertisements may not influence the decision to travel, they certainly influence the choice of destination.

- Canadian travellers who resort to ads to plan their trips have a higher education than those who do not and a higher income, but are on average younger (46 years vs. 50 years). American travellers who resort to ads to plan their trips also have a higher education and income than those who do not, but are on average older (46 vs. 44 years) than those who do not use advertisements.

- American and Canadian travellers who are influenced by ads are much more active than those who do not consult ads in terms of the travel experiences that they seek or the activities they engage in while on a trip.

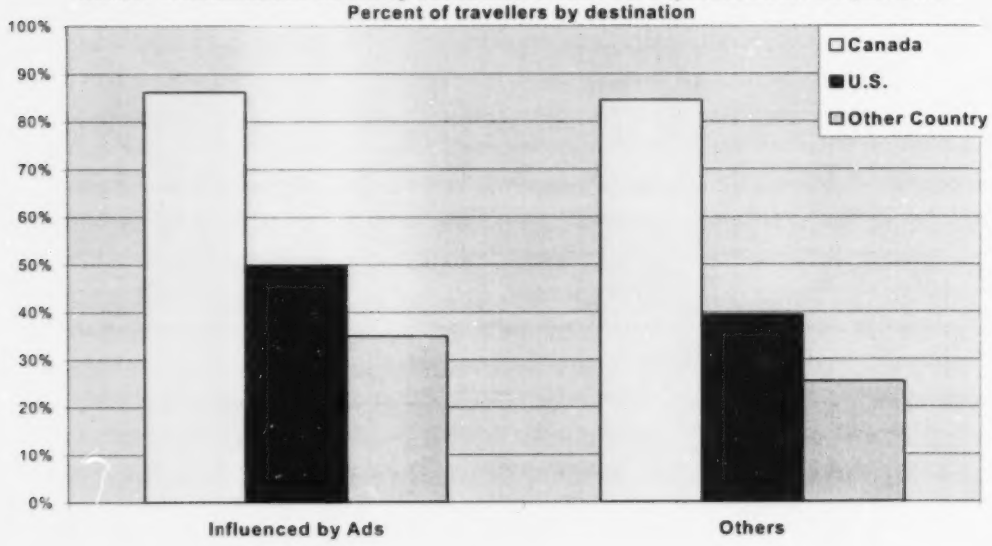
- Fourteen percent of the Canadian travellers who were influenced by ads and had taken a getaway trip, took a scheduled group tour as opposed to 9% for other travellers, while 15% of those who were influenced by ads and had taken a longer holiday, took a scheduled group tour as opposed to 12% for other travellers. For the Americans, 19% of the travellers who were influenced by ads and had taken a getaway trip, took a scheduled group tour as opposed to 13% for other travellers, while 19% of those who were influenced by ads and had taken a longer holiday, took a scheduled group tour as opposed to 12% for other travellers.

- Over half of the Canadian travellers and 46% of the American travellers who resort to advertisements to plan their trips had taken a packaged deal over the last two years as opposed to only 20% for the other Canadian travellers and 23% of other American travellers. This is a consequence of the fact that many package deals appear as advertisements in newspapers - a source that other travellers do not consult. By far, theatre packages seem to be the most popular for both groups.

THE CANADIAN MARKET

A total of 6.2 million Canadians aged 18 years and over who had taken a trip of one or more nights over a two-year period indicated that they used advertisements as an information source to plan their getaways or longer holidays. This accounts for 34.7% of all Canadians aged 18 years and over who had taken a trip of one or more nights over a two-year period.

CHART 1: Destinations visited by Canadian travellers for any reason over a 2-year period
Percent of travellers by destination



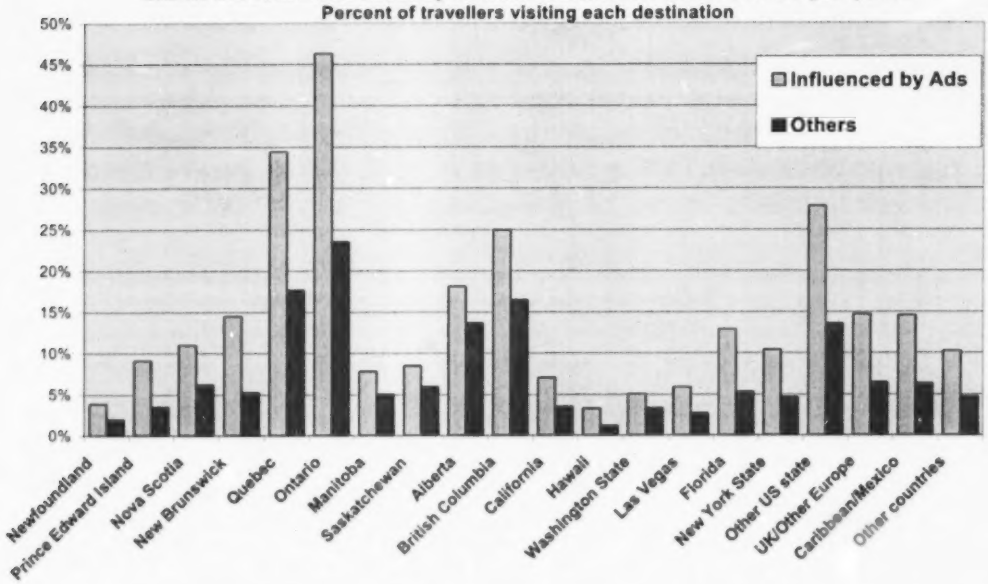
Quebec is the province with the highest incidence of travellers influenced by ads (40% as opposed to 34.7% for the national average), while Ontario is marginally above the national average (36%).

Of the Canadian travellers who consulted advertisements in order to plan their trip, 95% took a getaway trips (1-3 nights) and 92% took a longer vacation trips (4 nights and over), while of the travellers who did not consult advertisements 65% took a getaway trip and 62 % took a longer vacation.

As Chart 1 shows, Canadian travellers who had used advertisements as information sources to plan their trips appear to have the same incidence of travel, for any purpose, to Canada, but a much higher incidence of travel to the US or to overseas countries.

In terms of the destinations visited for overnight leisure trips, those who used ads had a higher incidence of visitation to any destination (Chart 2) and they took one

CHART 2: Destinations visited by Canadian travellers for leisure over a 2-year period
Percent of travellers visiting each destination



and a half times more overnight leisure trips than those who did not use ads (average number of leisure trips: 11.9 vs. 7.6 - chart not shown), except for trips to Newfoundland, Saskatchewan, Washington State and New York State in which those who did not use ads took on average more overnight leisure trips than those who did use ads.

CHART 3: Percent of Overnight Canadian Leisure Travellers in each Destination
Accounted for by Those Who Are Influenced By Ads

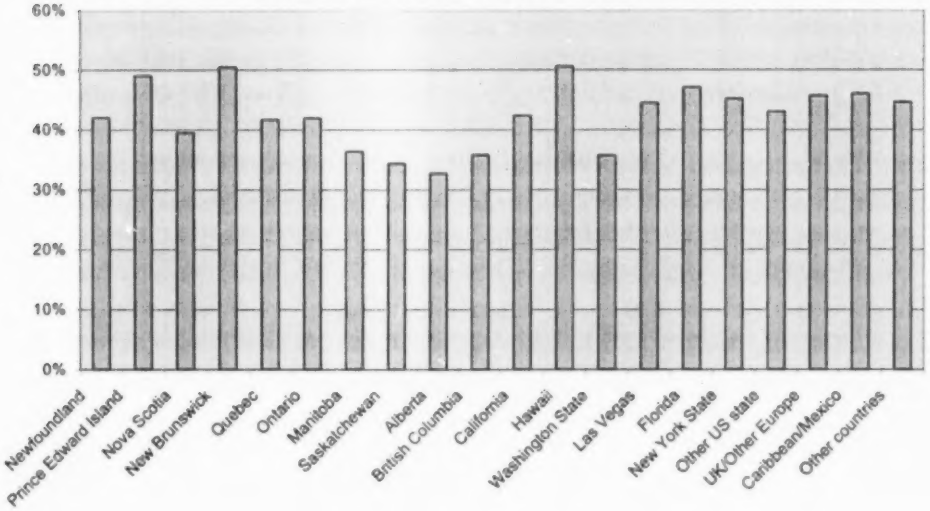


Chart 3 shows the proportion of Canadian overnight leisure travellers in each of the destinations listed there accounted for by those that are influenced by ads. As expected, given their overall size (one-third of the Canadian travellers) travellers who are influenced by ads do not represent the majority of the Canadian visitors to any destination except for New Brunswick and Hawaii. Alberta is the destination with the lowest proportion of travellers who are influenced by ads.

CHART 4: Source of Information Used to plan Getaways Trips
% of travellers who used a specific source of information

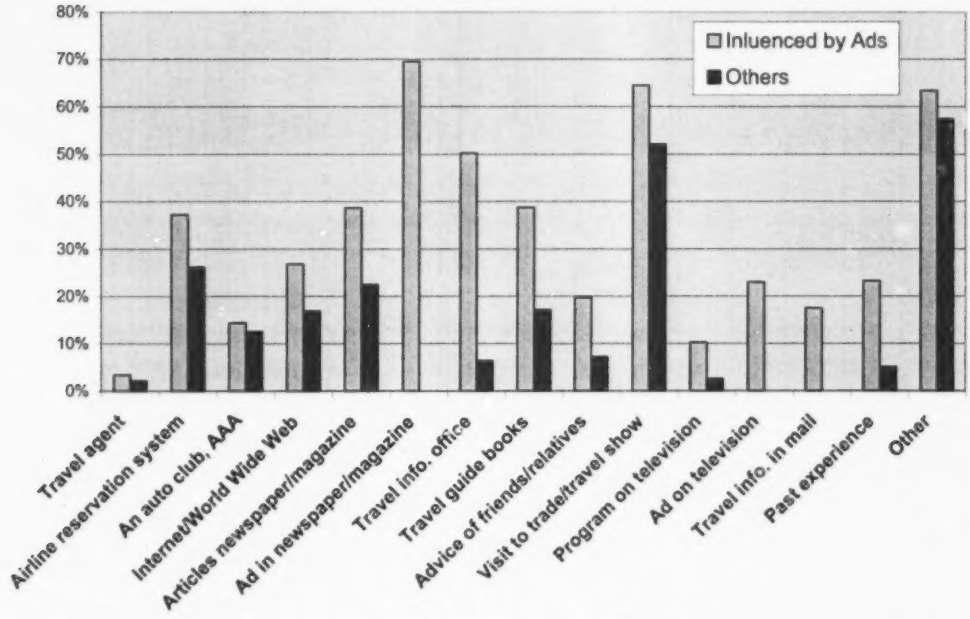


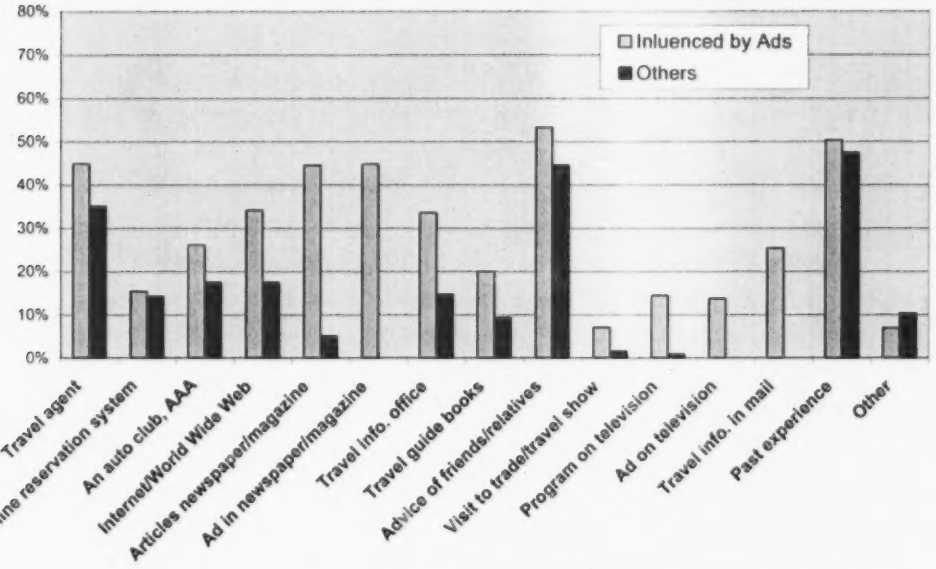
Chart 4 shows the sources of information that Canadian travellers use to plan their overnight getaway trips. What is interesting to note in Chart 4 is the fact that advertisements in newspapers and magazines are by far the most consulted sources of information by those who are influenced by ads, followed by visits to travel and trade shows. On the other hand, advertising pamphlets received by mail or TV ads are not very significant sources of information for them.

Chart 5 shows the sources of information that Canadian travellers use to plan their longer vacation trips (4 nights and over). The advice of friends and relatives and past experience with the destination are the top two sources of information for both groups, while advertisements in newspapers are at the same level of significance as travel agents and articles (as opposed to ads) in newspapers or magazines.

The data on Charts 4 and 5 seems to suggest that compared to longer holidays, getaways trips are driven by "spare-of-the-moment" decisions based on the attractiveness of pac kage deals depicted in newspapers or magazines.

The information presented in Charts 1 and 2 poses the following question: Do people who use ads as a source of travel information get influenced by them and as such travel more than the others, or do they have a higher tendency to travel and it is because of this that they consult more information sources? In other words, do the ads cause the higher incidence of travel or is it that the higher incidence of travel causes resorting to ads?

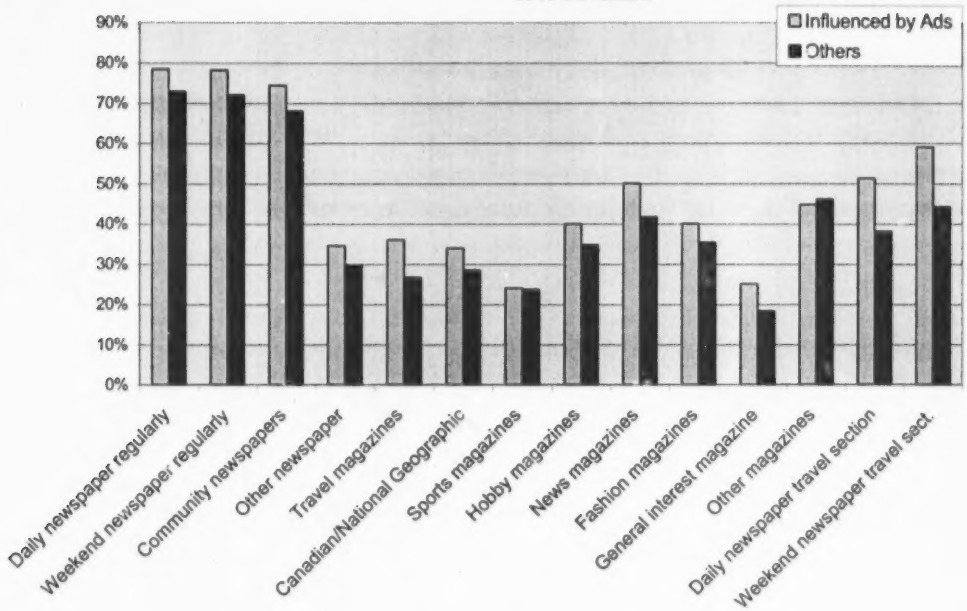
CHART 5: Sources of Information Used to plan Vacations (4+ nights)
% of travellers who used a specific source of information



Although the data captured by TAMS do not provide a definitive answer to this question, the information presented in charts 4 and 5 seems to suggest that a higher tendency to travel may be causing resorting to ads rather than the other way around. Charts 4 and 5 show that, as was the case with the destinations visited, travellers who are influenced by ads consult more of any travel information source than those who are not, or that they are more on the lookout for travel bargains and new destinations...and this is so because they are more interested in travel than others.

Irrespective of the causality between frequency of travel and advertisements, charts 4 and 5 also seem to indicate that although advertisements may not influence the decision to travel, they certainly influence the choice of destination

CHART 6: Publications read on a regular basis
% of travellers



since they are major sources of travellers' information, especially for the getaway market.

In terms of their regular reading habits, those who are influenced by ads have a higher incidence of readership of any newspaper or magazine than those who are not influenced by ads, especially for the travel sections of daily and weekend editions of newspapers.

With respect to TV programs, those who are influenced by ads tend to have a higher incidence of watching news shows, news magazines, nature shows and instructional or hobby shows, while the travellers who do not consult ads for trip-planning purposes watch more daytime TV and professional sports shows (Chart 7).

Those who resort to advertisements to plan their trip, especially for short getaway trips, also have a higher incidence of attending travel and trade shows (Chart 8) than those who do not resort to ads.

In terms of demographics, travellers who resort to ads to plan their trips have a higher education than those who do not (Chart 9) and a higher income (Chart 10), but are on average younger (46 years vs. 50 years) (Chart 11).

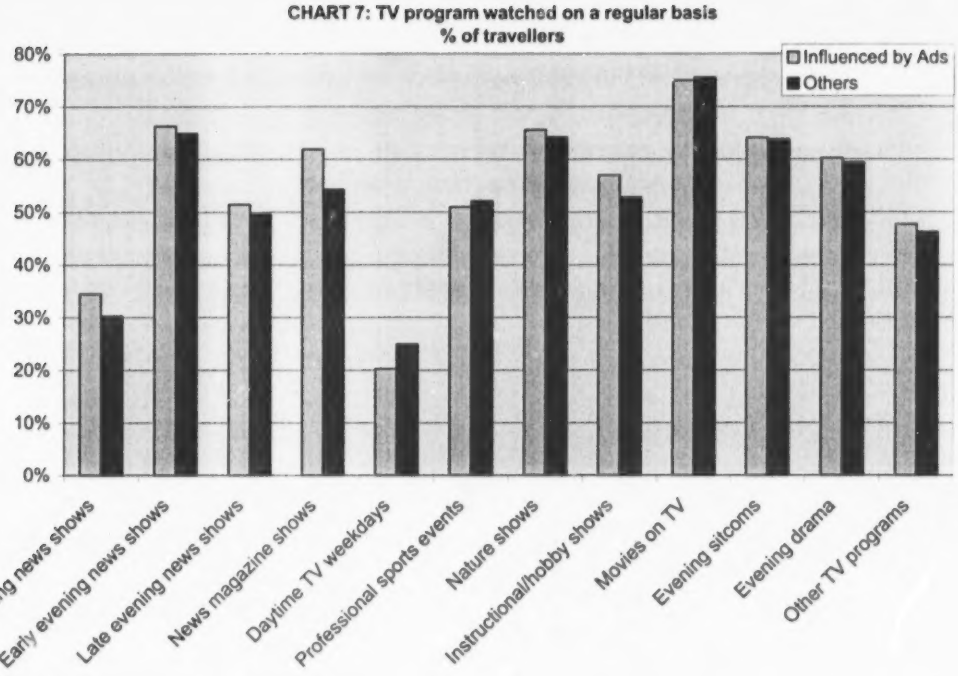


Chart 12 depicts the types of travel exper iences that travellers who are influenced by advertisements and those who are not sought during overnight leisure trips over a two-year period. As a result of their higher incidence of travel, those who are influenced by ads have a high er incidence of participation in any travel experience.

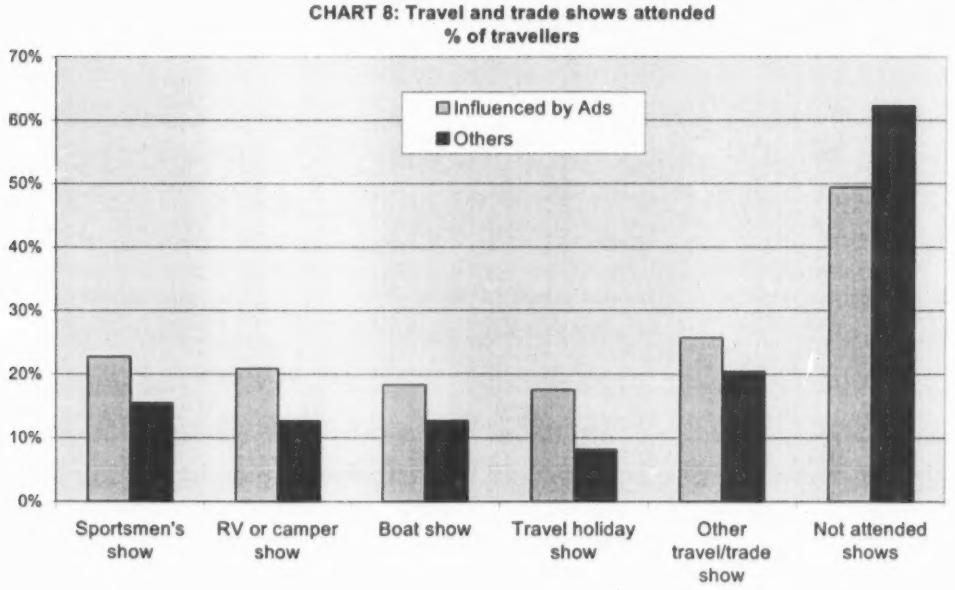


CHART 9: Education level completed

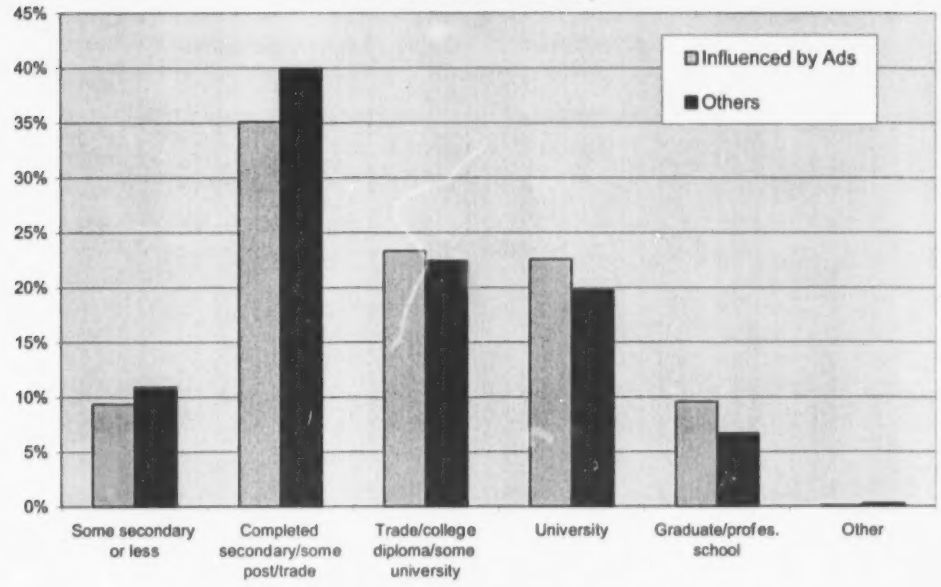


CHART 10: Household Income

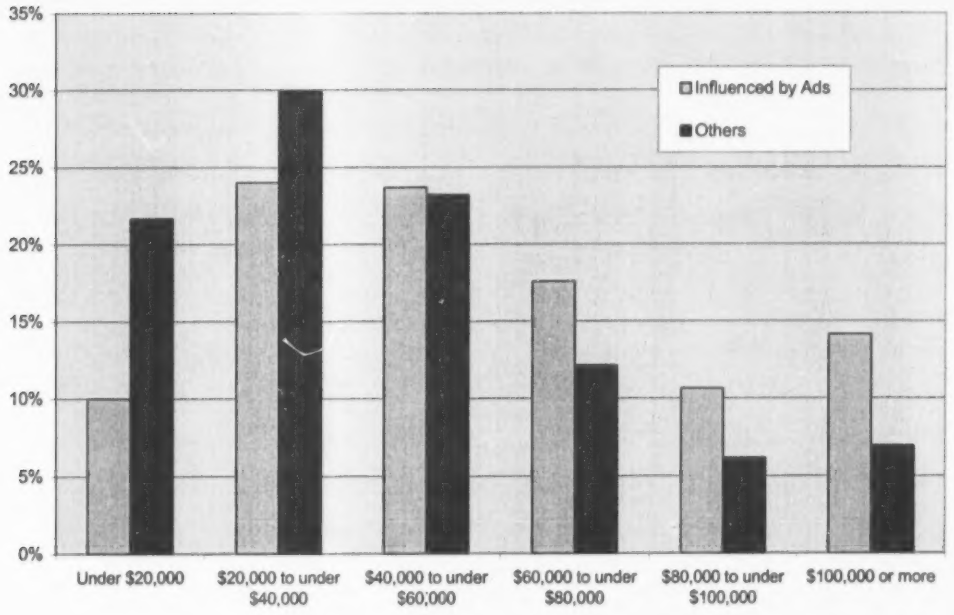
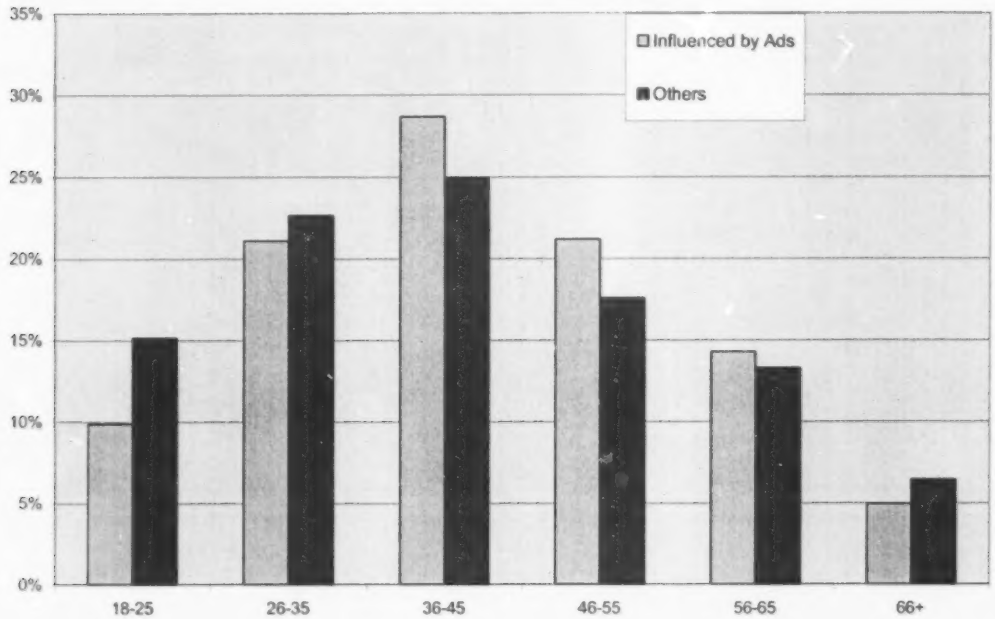


CHART 11: Respondent's Age



Relative to other travellers, those who are influenced by ads have a significantly higher incidence of participation in the following travel experiences (in rank order):

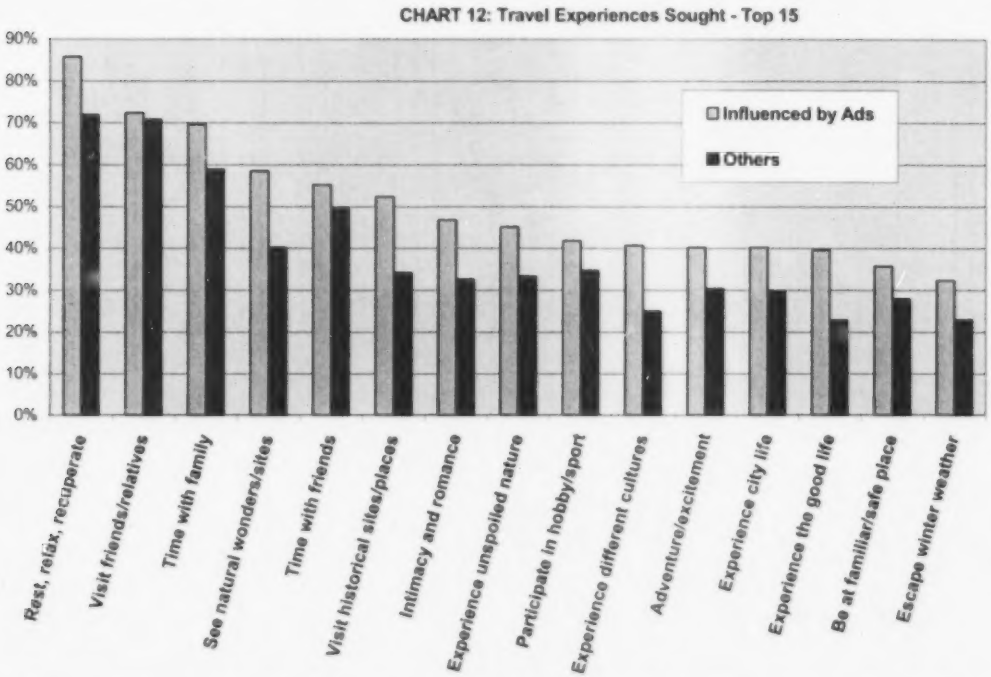
- Experience the good life (fine cuisine, good wine, being pampered)
- Experience different cultures and ways of life
- Visit historical sites and important places in history
- See natural wonders and important natural sites
- Intimacy and romance
- Escape the winter weather

...experiences that correlate with their higher income and education.

As was the case with travel experiences, travellers who are influenced by ads tend to be more active while on a trip than other travellers (Chart 13), with touring and accommodation-related activities (such as going to a resort, fly-in outpost, B&B, or camping) exhibiting the largest differences between the two groups.

Fourteen percent of the travellers who were influenced by ads and had taken a getaway trip, took a scheduled group tour as opposed to 9% for other travellers, while 15% of those who were influenced by ads and had taken a longer holiday, took a scheduled group tour as opposed to 12% for other travellers.

Over half of the travellers who resort to advertisements to plan their trips had taken a packaged deal over the last two years as opposed to only 20% for the other travellers. This is a consequence of the fact that many package deals appear as



advertisements in newspapers - a source that other travellers do not consult. Chart 14 shows the different types of packages that both groups purchase. By far, theatre packages seem to be the most popular for both groups.

In terms of their perceptions of Ontario, travellers were presented with 25 statements about the province and were asked to indicate whether they agreed or disagreed with the statement using a 10-point scale. Among those who gave Ontario a 9 or a 10, the two groups of travellers demonstrate somewhat significant differences of opinion (difference greater or equal to ±10%) in the following areas:

- One of the best summer destinations (+14%)[1]
- A place with lots of things for young adults to see and do (+13 %)
- A place that respects the natural environment (+12%)
- A place with interesting shops (+11%)
- A great place to relax and get away from it all (+11%) and
- A great place to experience city life (+10%)

[1] The number in the brackets denotes the percent difference in the proportion of the two travellers groups who gave Ontario 9 or 10 on a ten-point scale. A plus sign means that the travellers who are influenced by ads ranked Ontario higher than the other travellers.

CHART 13: Activities Participated in During Past Overnight Trips

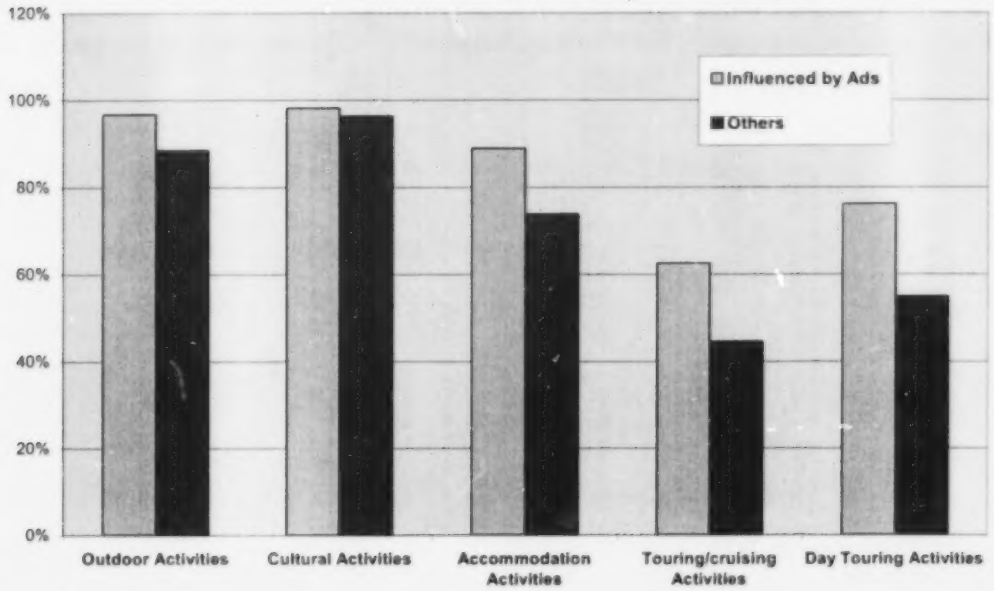
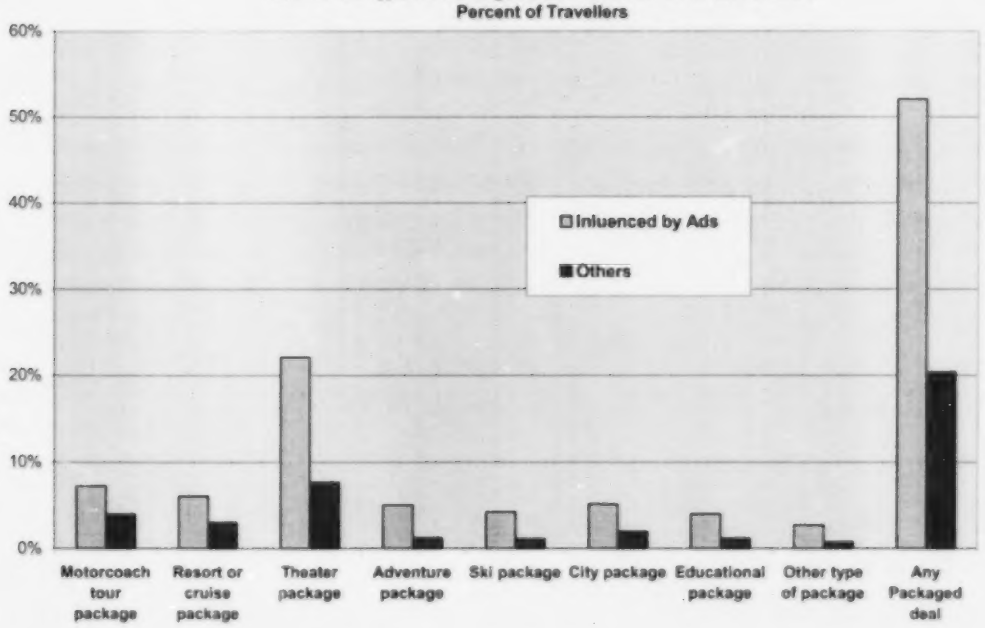


CHART 14: Types of Packaged Deals Taken Over the Last 2 Years
Percent of Travellers

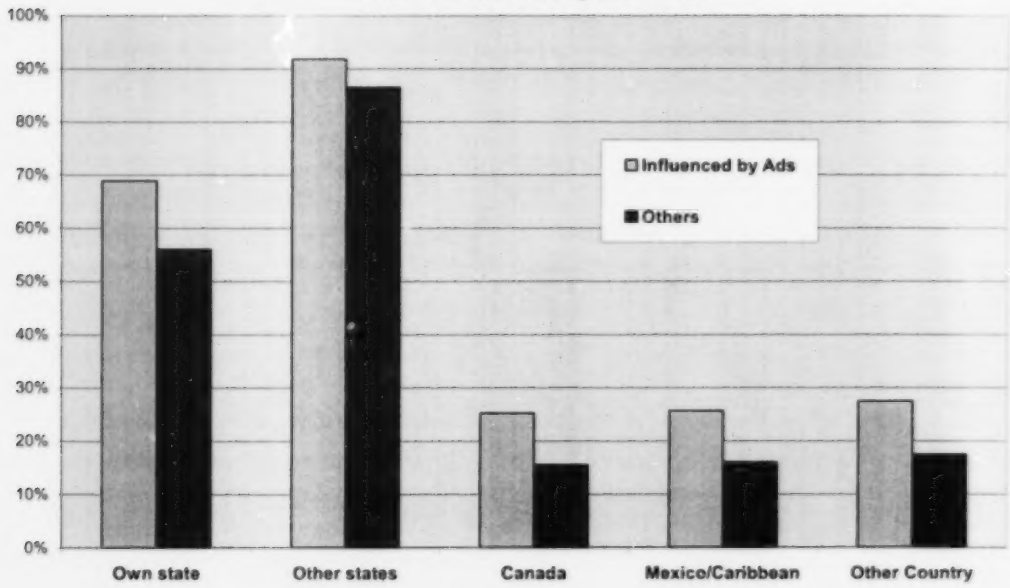


THE US MARKET

A total of 61.6 million Americans aged 18 years and over who had taken a trip of one or more nights over a two-year period indicated that they used advertisements as an information source to plan their getaways or longer holidays. This accounts for 40.3% of all Americans aged 18 years and over who had taken a trip of one or more nights over a two-year period - an incidence that is 16% higher than that of their Canadian counterparts.

Of the American travellers who consulted advertisements in order to plan their trip, 99% took a getaway trip (1-3 nights) and 96% took a longer vacation (4 nights and over), while of the travellers who did not consult advertisements 70% took a getaway trip and 64 % took a longer vacation.

CHART 15: Destinations visited by US travellers for any reason over a 2-year period
Percent of travellers by destination

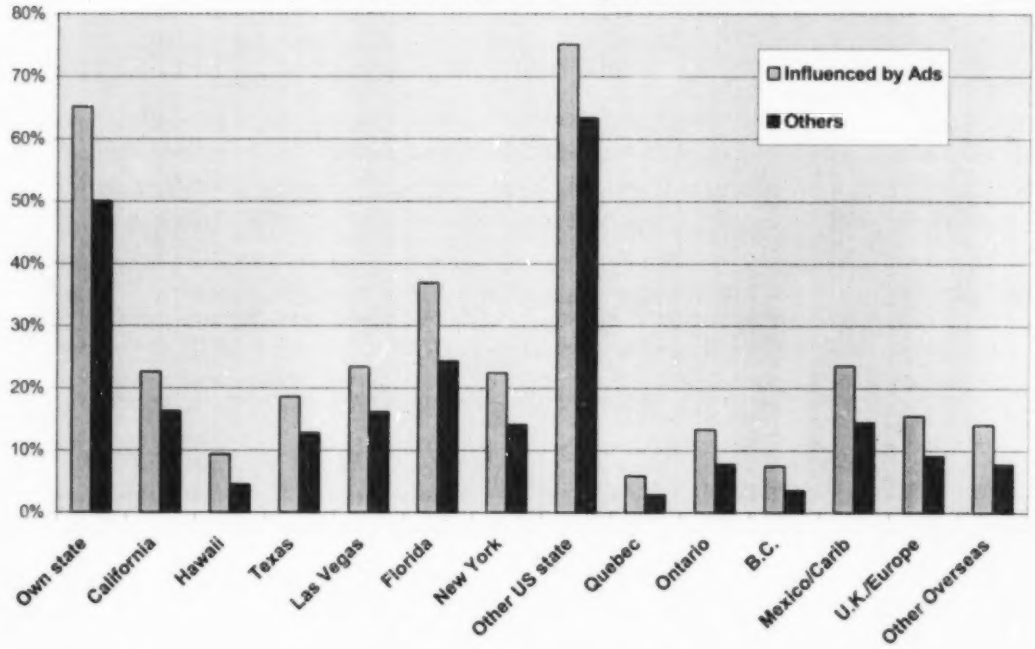


As Chart 15 shows, American travellers who had used advertisements as information sources to plan their trips have a higher incidence of travel than other travellers, for any purpose, to any destination, especially to Canada, Mexico/Caribbean and Other Countries.

In terms of specific destinations visited for overnight leisure trips, again those who used advertisements had a higher incidence of visitation to any destination

(Chart 16) and they took almost double the number of overnight leisure trips than those who did not use ads to plan their trips (average number of overnight leisure trips: 8 vs. 5.4 - these data are not presented in a chart).

CHART 16: Destinations visited by US travellers for leisure over a 2-year period
Percent of travellers visiting each destination



For the following destinations those who consulted ads to plan their trip had a significantly higher incidence of leisure travel than other travellers (in rank order):

- BC
- Hawaii
- Quebec
- Other Overseas countries
- Ontario
- UK/Europe

Chart 17 shows the proportion of overnight US leisure travellers in each of the destinations listed there accounted for by those who are influenced by ads. Given their overall size (40% of the US travellers), it is surprising to see that the travellers who are influenced by ads represent the majority of the US visitors to most of the destinations listed in Chart 17, especially in the Atlantic provinces, Saskatchewan and Yukon. "Other US states" is the destination with the lowest proportion of US travellers who are influenced by ads.

CHART 17: Percent of Overnight US Leisure Travellers in each Destination Accounted for by Those Who Are Influenced By Ads

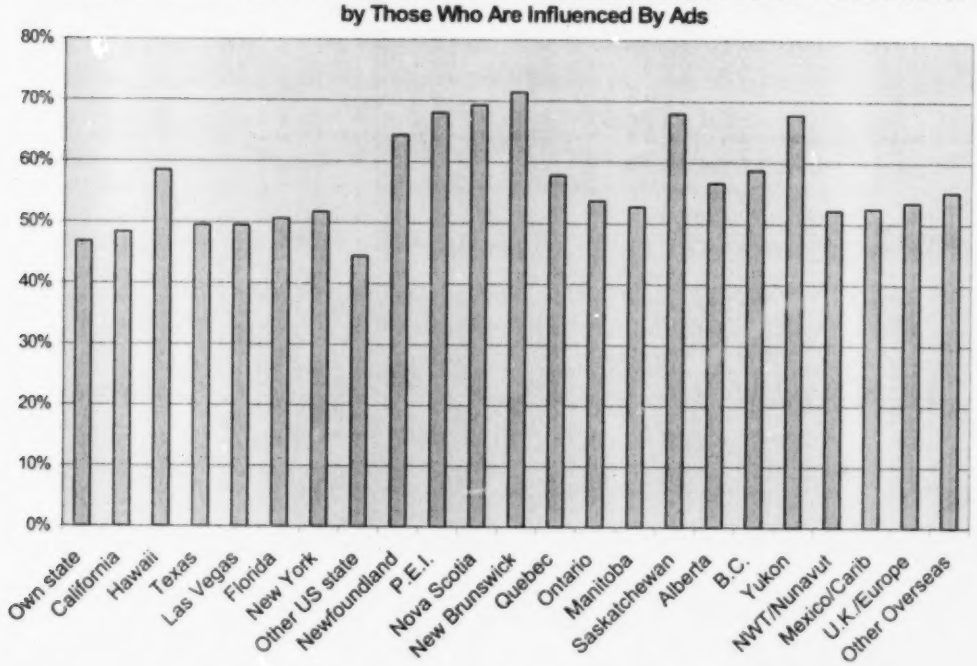


Chart 18 shows the sources of information that US travellers use to plan their overnight getaway trips. As was the case with the Canadian market, advertisements in newspapers and magazines are by far one of the most consulted sources of information by those who are influenced by ads, while advertising pamphlets received by mail or TV ads are not ver y significant sources of information for them.

Chart 19 shows the sources of information that US travellers use to plan their longer vacation trips (4 nights and over). Again, as was the case with the Canadian market, the advice of friends and relatives and past experience with the destination are the top two sources of information for both groups, while advertisements in newspapers are now a bit lower than the level of significance of travel agents, the Internet or articles (as opposed to ads) in newspapers or magazines.

In terms of their regular reading habits, the American travellers who are influenced by ads are quite different from their Canadian counterparts. With the exception of travel magazines and the travel sections of daily and weekend newspapers, it is now the other travellers who have a higher incidence of readership (Chart 20).

CHART 18: Source of Information Used to plan Getaways Trips
% of travellers who used a specific source of information

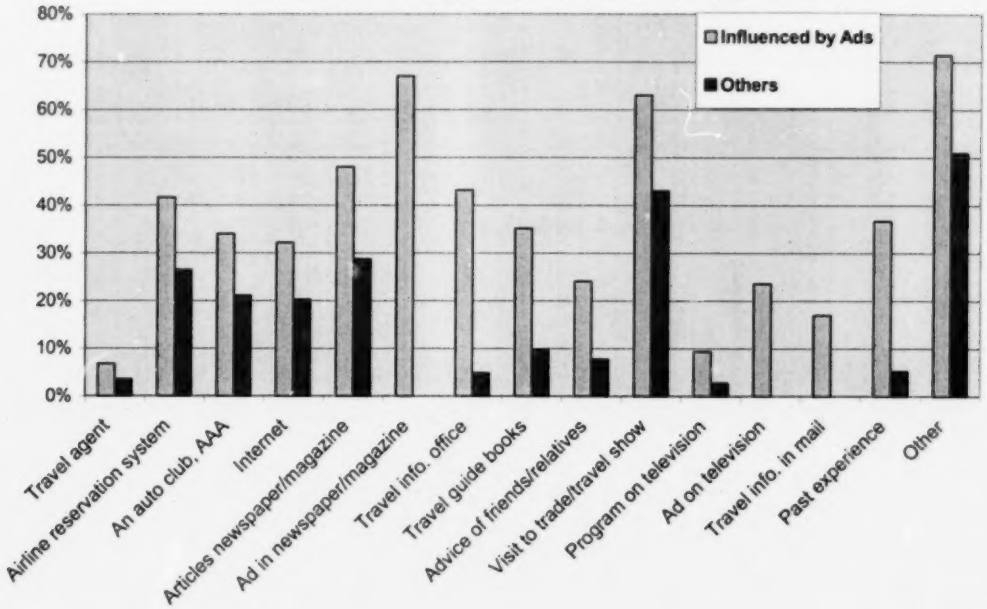


CHART 19: Sources of Information Used to plan Vacations (4+ nights)

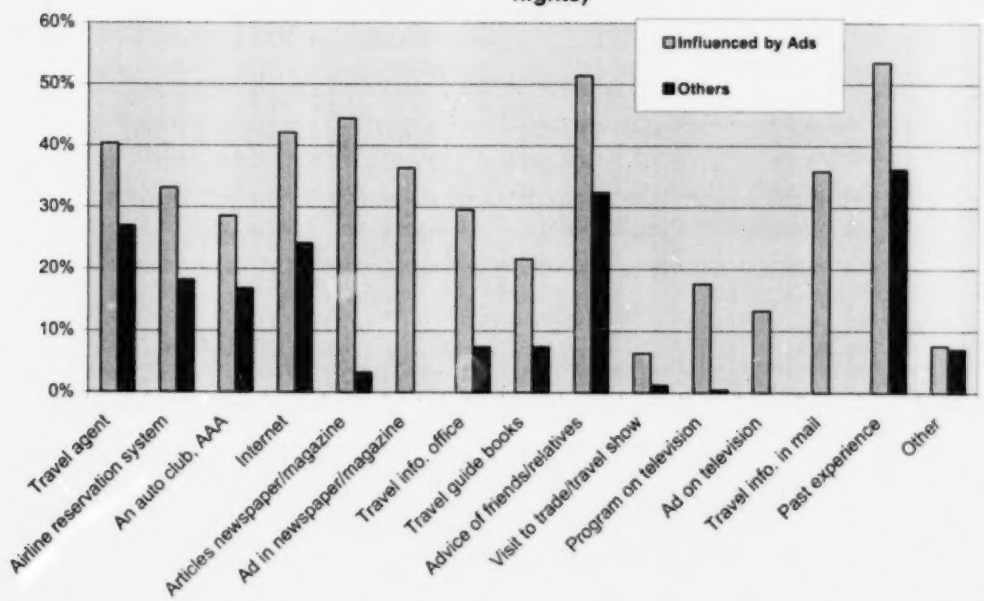
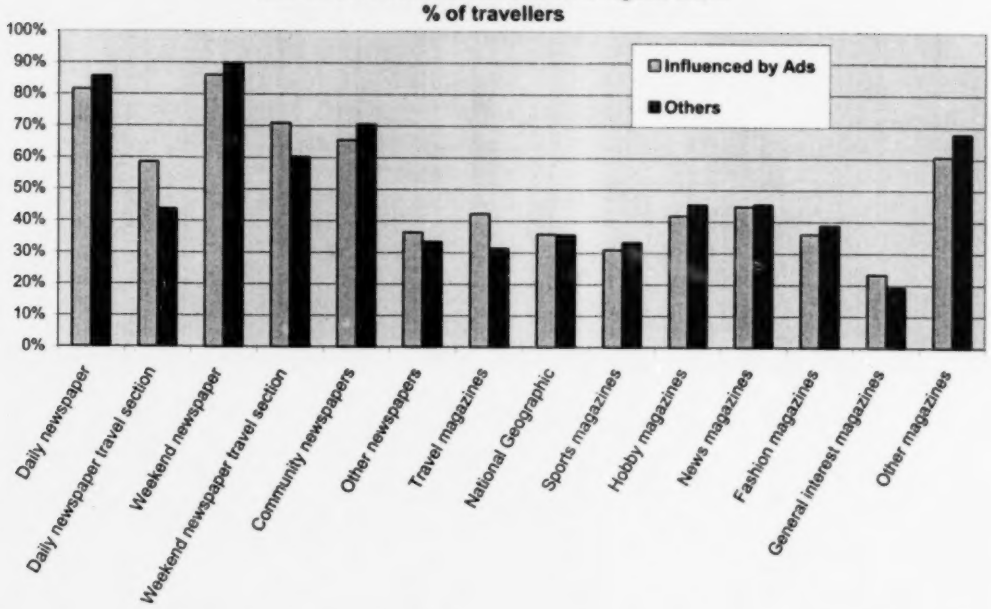


CHART 20: Publications read on a regular basis
% of travellers



With respect to TV-watching, again those American travellers who are influenced by ads are quite different from their Canadian counterparts as they have a lower incidence of TV watching irrespective of the TV program (Chart 21). "Movies on TV" is the most popular TV program for both groups of American travellers.

CHART 21: TV program watched on a regular basis
% of travellers

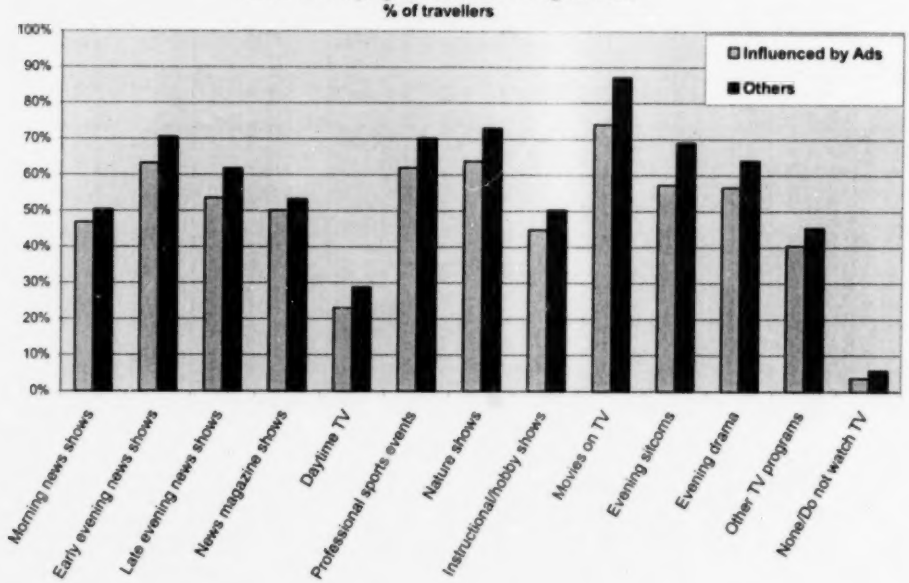
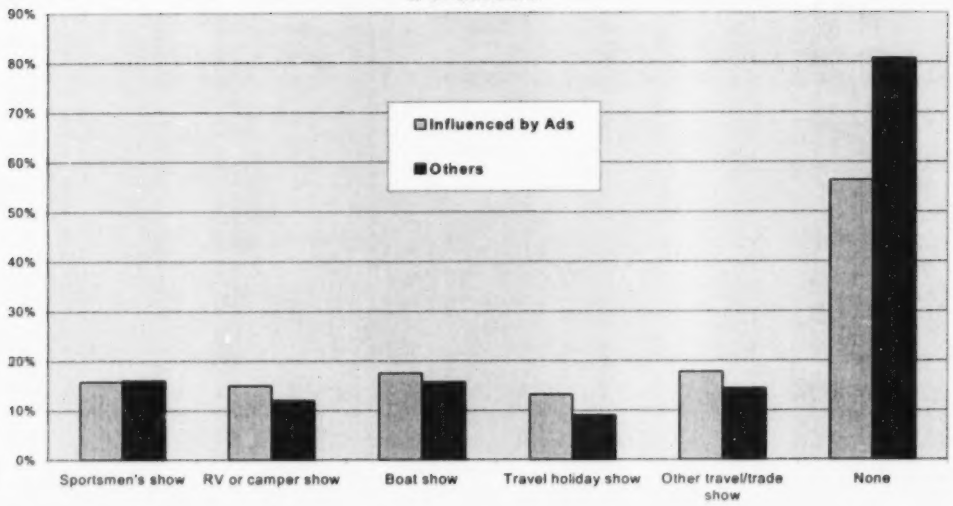
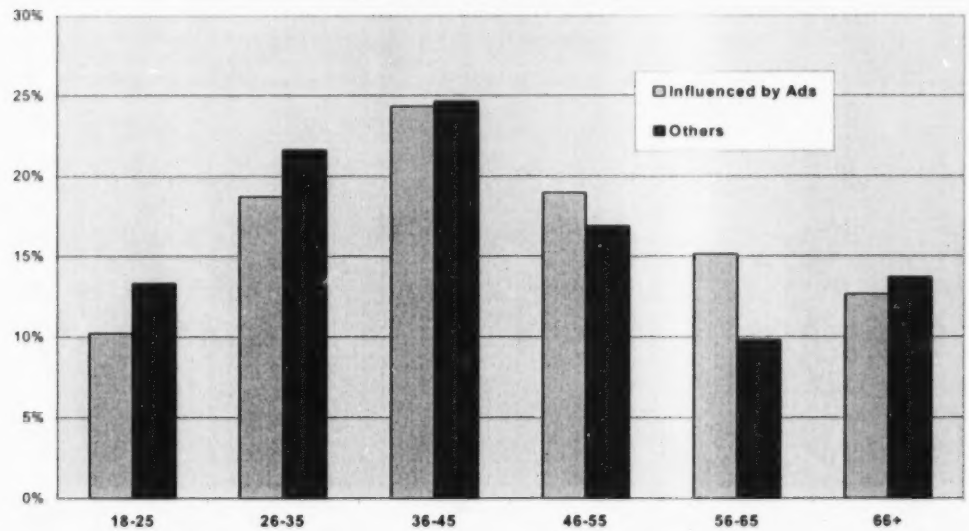


CHART 22: Travel and trade shows attended
% of travellers



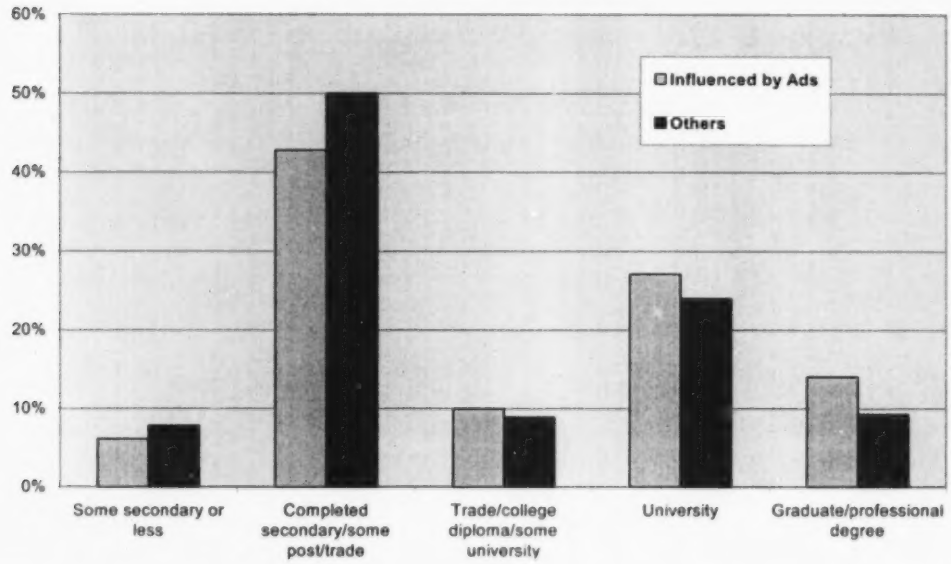
However, when it comes to attending travel or trade shows the American travellers who resort to advertisements to plan their trip are very similar to their Canadian counterparts (Chart 22) and they exhibit the same higher incidence of attendance than those who do not r esort to ads.

CHART 23: Respondent's Age



As was the case with their Canadian counterparts, US travellers who resort to ads to plan their trips have a higher education (Chart 24) and a higher income (Chart

CHART 24: Education level completed



25) than those who do not, but, contrary to their Canadian counterparts, are on average older (46 vs. 44 years) than those who do not use advertisements.

CHART 25: Household Income

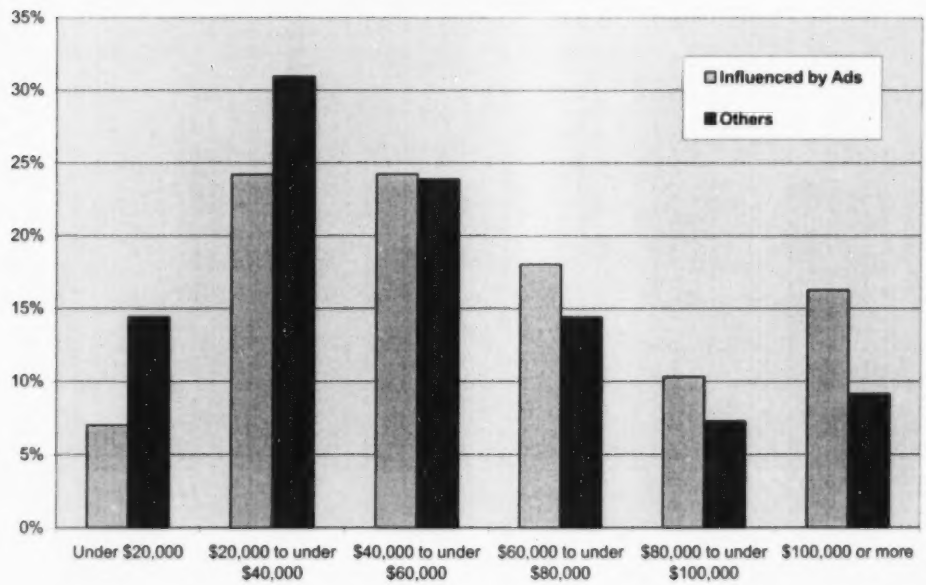
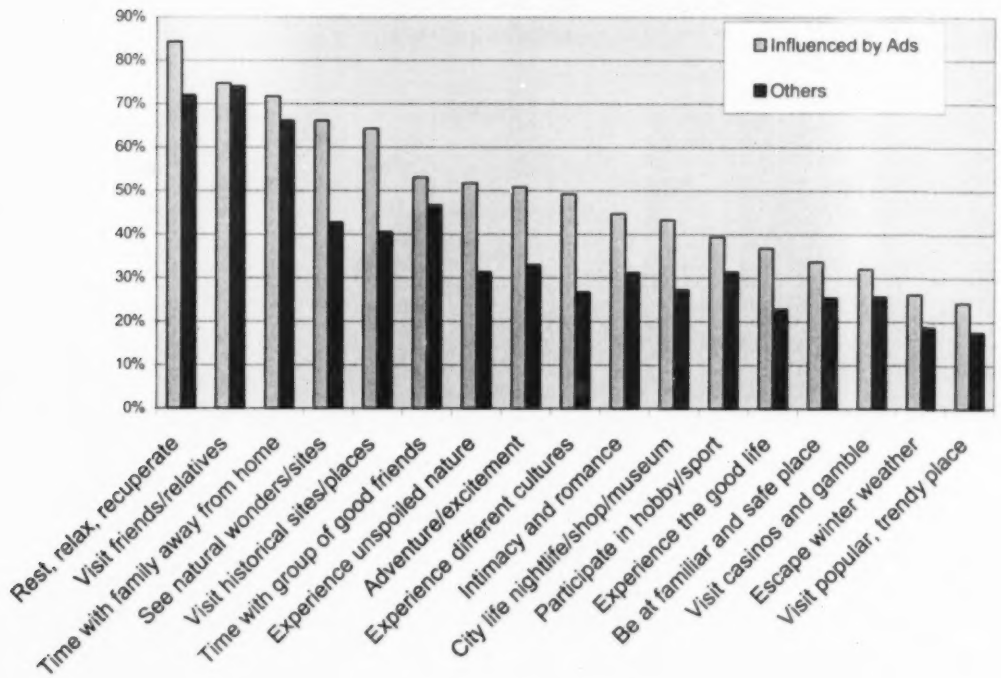


Chart 26 depicts the types of travel experiences that travellers who are influenced by advertisements and those who are not sought during overnight trips over a two-year period. As a result of their higher incidence of travel, those who are influenced by ads have a higher incidence of participation in any travel experience.

Relative to other travellers, those who are influenced by ads have a significantly higher incidence of participation (50% or higher) in the following travel experiences (in rank order):

- Experience different cultures and ways of life
- Participate in a hands-on learning experience (archaeological digs, cooking courses, learning another language)
- Experience unspoiled nature
- Experience the good life (fine cuisine, good wine, being pampered)
- Experience city life (nightlife, shopping, museums)
- Visit historical sites and important places in history
- See natural wonders and important natural sites
- Experience adventure and excitement

CHART 26: Travel Experiences Sought - Top 16



As was the case with travel experiences, travellers who are influenced by ads tend to be more active while on a trip than other travellers (Chart 27), with touring and accommodation-related activities (such as going to a resort, fly-in outpost, B&B, or camping) exhibiting the largest differences between the two groups.

Nineteen percent of the travellers who were influenced by ads and had taken a getaway trip, took a scheduled group tour as opposed to 13% for other travellers, while 19% of those who were influenced by ads and had taken a longer holiday, took a scheduled group tour as opposed to 12% for other travellers.

Close to half (46%) of the travellers who resort to advertisements to plan their trips had taken a packaged deal over the last two years as opposed to 23% for the other travellers. This is a consequence of the fact that many package deals appear as advertisements in newspapers - a source that other travellers do not consult. Chart 28 shows the different types of packages that both groups purchase. By far, theatre packages seem to be the most popular for both groups.

CHART 27: Activities Participated in During Past Overnight Trips

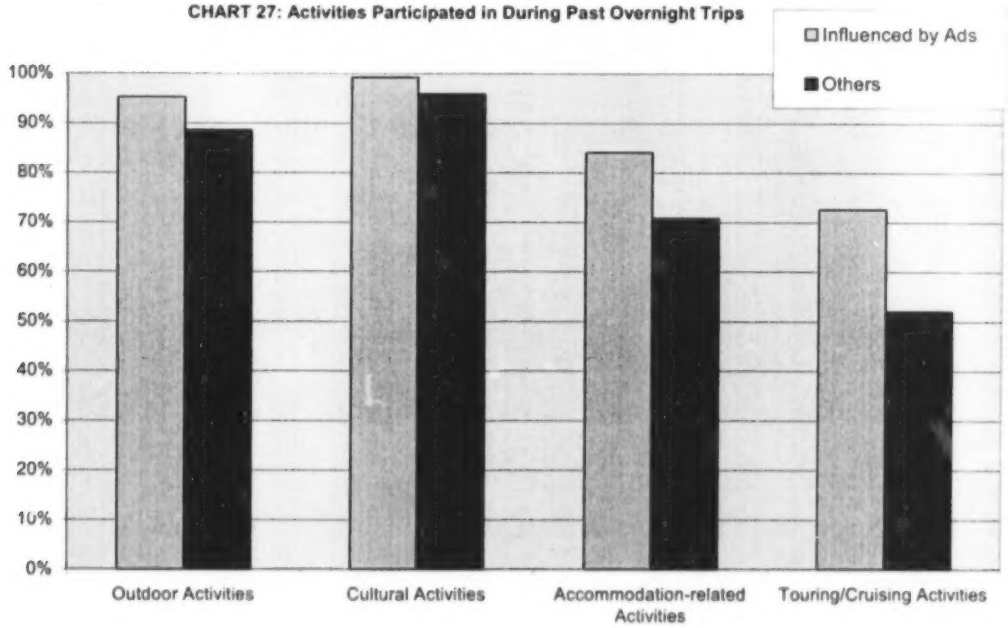
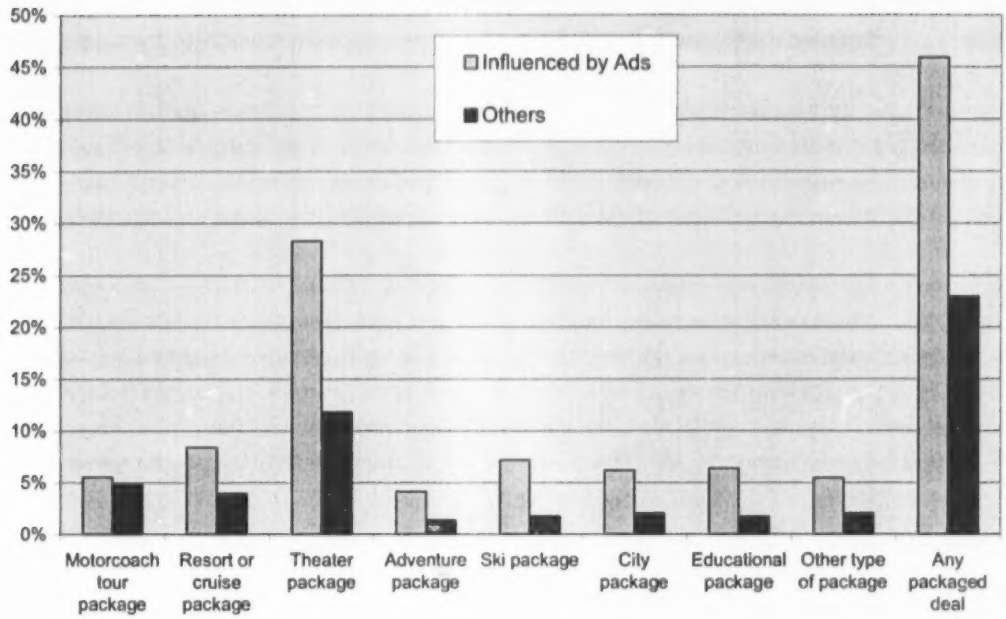


CHART 28: Types of Packaged Deals Taken Over the Last 2 Years
Percent of Travellers

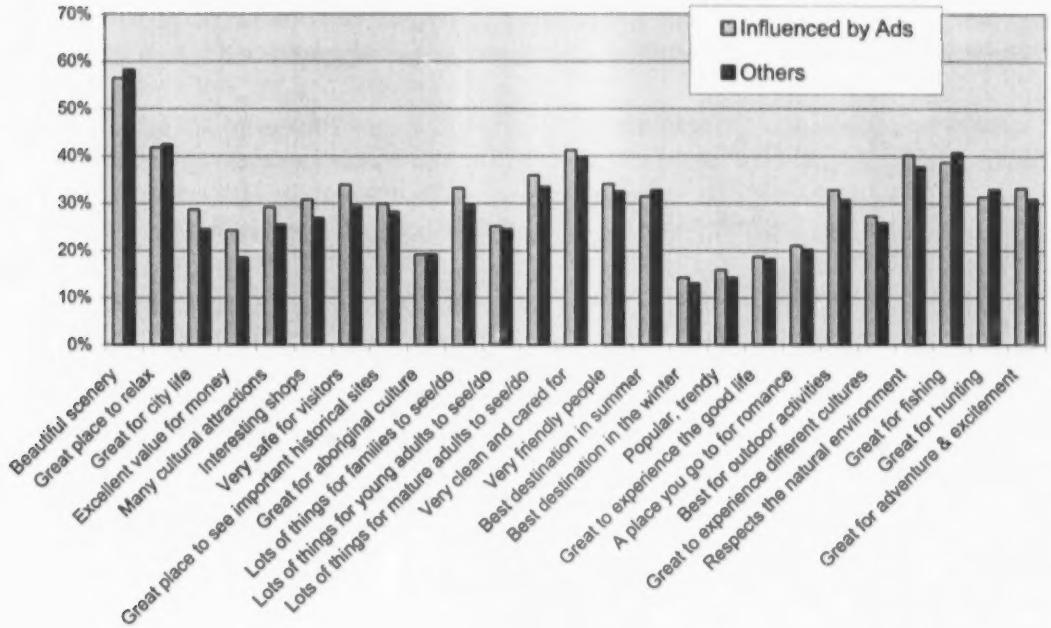


In terms of their perceptions of Ontario, travellers were presented with 25 statements about the province and were asked to indicate whether they agreed or disagreed with the statement using a 10-point scale. Among those who gave Ontario a 9 or a 10, the two groups of travellers demonstrate somewhat significant differences of opinion (difference greater or equal to ±10%) in the following areas:

- Excellent value for money (+31%)[2]
- A great place to experience city life (+17%)
- A place that is very safe for visitors (+15%)
- A place with interesting shops (+15%)
- A place with many cultural attractions (15%)
- A popular, trendy place (11%)
- A place with lots of things for families to see and do (+11%)

[2] The number in the brackets denotes the percent difference in the proportion of the two travellers groups who gave Ontario 9 or 10 on a ten-point scale. A plus sign means that the travellers who are influenced by ads ranked Ontario higher than the other travellers.

CHART 29: Perceptions of Ontario - Travellers who gave Ontario a 9 or a 10



Influencé par la publicité? Un profil des personnes qui consultent les annonces publicitaires pour planifer leurs voyages

[Titre fourni par le catalogueur]

RÉSUMÉ DE LA DIRECTION

- Un total de 6,2 millions de Canadiens et 61,6 millions d'Américains âgés de 18 ans et plus qui ont voyagé pendant au moins deux jours de suite au cours des deux dernières années ont indiqué qu'ils utilisaient les publicités comme source d'information pour planifier leur voyage ou des vacances plus longues. Cela représente 34,7 % de tous les Canadiens et 40,3 % de tous les Américains âgés de plus de 18 ans qui ont fait un voyage de plus d'une journée au cours des deux dernières années.

- Les voyageurs canadiens qui ont utilisé les publicités comme source d'information pour planifier leur voyage voyagent autant, pour toutes sortes de raison, au Canada, mais plus encore aux États-Unis ou outre-mer, alors que les voyageurs américains qui ont utilisé les publicités comme source d'information pour planifier leur voyage sont plus nombreux que les autres voyageurs, toute raison et toute destination confondues, à visiter particulièrement le Canada, le Mexique, les Caraïbes et outre-mer.

- Les voyageurs canadiens qui consultent des annonces ne représentent pas la majorité des visiteurs canadiens qui voyagent pour le loisir pendant plus d'une journée, peu importe la destination, à l'exception du Nouveau-Brunswick et de Hawaii. Cependant, les voyageurs qui consultent les annonces publicitaires représentent la majorité des voyageurs américains qui voyagent plus d'une journée pour le loisir vers la plupart des destinations que les Américains visitent, surtout les provinces maritimes, la Saskatchewan et le Yukon.

- Les publicités dans les journaux et dans les revues sont de loin les sources d'information les plus consultées par les voyageurs américains et canadiens qui sont influencés par les publicités, suivies par la visite de foires du voyage et du commerce. D'autre part, les dépliants informatifs reçus par courrier ou les annonces télévisées ne sont pas des sources très importantes d'information pour eux.

- Le conseil d'amis et de parents ainsi que l'expérience des voyages vers la destination sont les deux principales sources d'information des voyageurs américains et canadiens qui sont influencés par les publicités, alors que les publicités dans les journaux sont au même niveau d'importance que les agents de voyage et les articles (par opposition aux publicités) dans les journaux ou dans les revues pour les voyageurs canadiens influencés par les publicités et

à un niveau un peu moins élevé que les agents de voyage, Internet ou les articles dans les journaux et dans les revues pour leur équivalent américain.

- Comparées aux vacances, qui sont plus longues, les escapades sont motivées par des décisions prises à la volée en fonction de l'attrait que représentent les forfaits « tout inclus » dont font mention les journaux ou les revues.

- Est-ce que les personnes qui utilisent les publicités comme source de renseignements de voyage se laissent influencer par celles-ci et voyagent donc plus que les autres, ou ont-elles plus tendance à voyager à cause du nombre plus élevé de sources de renseignements qu'elles consultent? Même si les données recueillies par l'*Étude sur les activités des voyageurs et ce qui les motive* (TAMS) ne fournissent pas de réponse absolue à cette question, les renseignements fournis dans le présent rapport laissent penser qu'une tendance plus élevée au voyage peut inciter les voyageurs à se fier aux publicités plus souvent qu'autrement et que, si les publicités peuvent ne pas affecter la décision de voyager ou non, elles ont certainement une influence sur le choix de la destination.

- Les voyageurs canadiens qui se fient aux publicités pour planifier leur voyage possèdent un niveau de formation et un revenu plus élevés que ceux qui n'y ont pas recours, mais sont en moyenne plus jeunes (46 ans c. 50 ans). Les voyageurs américains qui se fient aux publicités pour planifier leur voyage possèdent un niveau de formation et un revenu plus élevés que ceux qui n'y ont pas recours, mais sont en moyenne plus vieux (46 ans c. 44 ans).

- Les voyageurs américains et canadiens qui sont influencés par les publicités sont beaucoup plus actifs que ceux qui ne consultent pas les publicités en ce qui a trait aux expériences de voyage qu'ils recherchent ou aux activités qu'ils entreprennent au cours de leur voyage.

- Quatorze pourcent des voyageurs canadiens qui ont été influencés par les publicités et qui ont entrepris un voyage d'escapade ont pris un voyage organisé contre 9 % pour les autres voyageurs, alors que 15 % de ceux qui ont été influencés par les publicités et qui ont entrepris un plus long voyage ont pris un voyage organisé contre 12 % pour les autres voyageurs. En ce qui a trait aux Américains, 19 % des voyageurs qui ont été influencés par les publicités et qui ont entrepris un voyage d'escapade ont pris un voyage organisé contre 13 % pour les autres voyageurs, alors que 19 % de ceux qui ont été influencés par les publicités et qui ont entrepris un plus long voyage ont pris un voyage organisé contre 12 % pour les autres voyageurs.

- Plus de la moitié des voyageurs canadiens et 46 % des voyageurs américains qui se sont basés sur les publicités pour planifier leur voyage ont pris un forfait au cours des deux dernières années contre seulement 20 % des autres voyageurs canadiens et 23 % des autres voyageurs américains. Il s'agit d'une conséquence du fait que plusieurs forfaits sont annoncés dans les journaux, média que les autres voyageurs ne consultent pas. Les forfaits théâtre semblent de loin être les plus populair es pour les deux groupes.